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OSHA Health and Safety Policy Template Checklist

1 - Management Leadership				
Management Leadership				
Management implements and communicates a written, signed policy supporting the safety and health program.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Management routinely demonstrates visible commitment to the program.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Management defines specific goals and expectations for the program, along with plans for achieving the goals.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Management allocates appropriate resources (funds and time) to accomplish goals and manage the program.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Management assigns responsibility and accountability for implementing and maintaining the program.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Management encourages, recognizes, and rewards worker contributions to workplace safety and health.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

2 - Worker Participation				
Worker Participation				
Workers are encouraged to participate in the program, have the means to participate, and feel comfortable participating and giving input on safety and health issues.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers are trained on how to report an injury, illness, hazard, or concern, including good catches/near misses.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers report injuries, illnesses, hazards, and concerns without fear of reprisal.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Reports of injuries, illnesses, hazards, or other concerns are acknowledged promptly.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

Reports of injuries, illnesses, hazards, or other concerns are resolved promptly, after worker input is sought, and are tracked to completion.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers have access to information they need to understand safety and health hazards and hazard control measures in the workplace.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers are assigned roles in or are otherwise involved in all aspects of the program.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers can participate without encountering language, skill, or education barriers; restrictions on participating during work time; or fear of retaliation or discrimination.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers have authority to initiate or request a temporary suspension or shutdown of any work activity or operation they believe to be unsafe.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

3 - Hazard Identification and Assessment

Hazard Identification and Assessment				
Written materials such as injury/illness logs, Safety Data Sheets, medical reports, workplace inspection results, incident investigation reports, and manufacturers' literature are reviewed to help identify hazards.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
The workplace is inspected regularly to identify conditions that pose or could pose a safety or health concern.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Inspections cover all areas and activities and include plant and transportation vehicles.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Before making changes to operations, workflow, physical plant, equipment, or materials, workers and managers conduct a review to identify any safety or health issues.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

The workplace is evaluated to identify worker exposure to health hazards. Trends in injury and illness data, reports of hazards, incidents, etc. are analyzed to identify common hazards.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Incidents (including close calls/near misses) and employee complaints are investigated to identify any hazards previously unrecognized or inadequately controlled. Investigations focus on identifying the root cause(s) of each incident.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Hazards associated with emergencies and non-routine operations are identified in the emergency action plan and operating procedures, respectively.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
All identified hazards are characterized with respect to the severity of potential, outcomes, likelihood of an event or exposure, and number of workers who might be exposed. This information is identified in operating procedures.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Interim controls are adopted while permanent controls are being determined.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
All serious and recognized hazards are addressed immediately, while prioritizing remaining hazards for further control.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

4 - Hazard Prevention and Control

Hazard Prevention and Control				
Options for controlling hazards are identified using sources such as OSHA, NIOSH, industry best practices, and input from workers.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Controls are selected according to the "hierarchy of controls," emphasizing (in order of priority) elimination, substitution, engineering controls, administrative controls, and PPE.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

A hazard control plan is used to plan and prioritize controls.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Controls are installed as soon as a hazard is identified.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Interim controls are used when permanent controls cannot be immediately implemented.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers are involved in selecting controls.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Controls are in place to protect workers during emergencies and non-routine operations.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Once installed, controls are monitored to ensure that workers understand their use and application and to verify that they are effective.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Implementation of controls is tracked to completion. Controls are inspected and maintained.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

5 - Education and Training

Education and Training				
Managers, supervisors, and workers understand the elements of the safety and health program and how to participate in it.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers understand the employers' responsibilities under the program.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Each worker understands his or her own role in the program.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers know whom to contact with concerns or questions, and understand the procedures for reporting injuries, incidents, hazards, and concerns.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers know that they have a right to participate in the program and report injuries and illnesses without fear of retaliation or discrimination.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers with assigned roles under the program receive training in how to carry out their roles.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

Workers are trained to understand how to recognize hazards and effective techniques for their control.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers can ask questions, receive answers, and provide feedback during and after training.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Employers, managers, and supervisors understand their responsibilities under the OSH Act; procedures for responding to workers' reports of injury, illness, or concern; techniques for identifying and controlling hazards; and fundamentals of incident investigation.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers receive supplemental training when a change in the workplace could introduce new or increased hazards.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers receive training in a language and at a literacy level that all of them can understand.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

6 - Program Evaluation and Improvement

Program Evaluation and Improvement				
Performance indicators are used to track progress toward program goals.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Performance is tracked using both lagging and leading indicators.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Performance data are analyzed and shared with workers.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Management does an initial review (and subsequent annual reviews) to evaluate the program and ensure that it is fully implemented and functioning as planned.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers are involved in all program review activities.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Program reviews examine key processes to ensure that they are operating as intended.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
The program is modified as needed to correct shortcomings.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

7 - Communication and Coordination

Communication and Coordination

Before contractors or staffing agencies bring their workers onsite, they and the host employers determine which among them will implement the various elements of the safety and health program.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Before contractors or staffing agencies bring their workers onsite, host employers give them enough information to assess hazards those workers may encounter, to understand the measures taken to control them (e.g., safety and health rules, when PPE is required, whom to contact in an emergency, etc.), and to avoid creating hazards that affect workers on the site.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Contractors and staffing agencies inform the host employer about injuries, illnesses, hazards, or concerns reported by their employees, and the results of any tracking or trend analysis that they perform.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Contractors and staffing agencies inform the host employer of any hazards arising from their work onsite and the controls in place to address those hazards	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Before contractors or staffing agencies bring their workers onsite, the host employer gives them the opportunity to conduct site visits or inspections and to review injury and illness records and other safety and health information.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Host employers communicate with contractors and staffing agencies and their workers about non-routine and emergency hazards and emergency procedures.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Host employers include any safety related specifications or qualifications in bid documents and contracts.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

Host employers coordinate with contractors and staffing agencies to ensure that work is planned and scheduled to minimize impacts on safety and health.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Staffing agency workers are adequately trained and equipped before arriving on site.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Host employer, contractor, and staffing agency policies and procedures are aligned to ensure that all workers receive consistent safety and health information.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented
Workers have access to managers with decision-making authority, to resolve any coordination issues or discrepancies.	Not Implemented	Partially Implemented	With Minor Deficiencies	Fully Implemented

8 - Completion

Completion
Recommendations

Full Name and Signature of the Inspector:

Please note that this checklist is a hypothetical example and provides basic information only. It is not intended to take the place of, among other things, workplace, health and safety advice; medical advice, diagnosis, or treatment; or other applicable laws. You should also seek your own professional advice to determine if the use of such checklist is permissible in your workplace or jurisdiction.